

DRAFT VERSION

IOWA ACCESS PROJECT PLAN

Project: Electronic Budget Submissions
Project Lead: Mr. Ron Amosson
Project Budget: \$193,000

Mission Statement:

All local government budget transactions will be completed electronically -- via Internet preferably, with allowances being allowed for the use of diskettes for jurisdictions that are not networked -- this information will be made available to the public electronically by the year 2000.

Needs Statement:

The current local budget process has not kept pace with technology, and the local governments and interested public parties need up-to-date, accurate information.

Problem Statement:

How do we achieve electronic communications between local governments, interested public parties, and the Department of Management for budgeting requirements?

Client Population

- Iowa's 99 counties
- Iowa's 377 schools
- Iowa's 950 cities
- Interested public parties

Project Purpose:

1. To make technically feasible the electronic submission of local budgets and valuation process data
2. Eliminate redundant data entry and duplication of effort between local and state agencies involved in valuations process
3. Display approved data on the Department of Management's home page on the Internet for public access and review
4. Simply the valuation process for local and state agencies and enhance the public's ability to access this data

Project Parameters:

The exchange of information between interested public parties and state /local governments, that is relative to local government budgets and property valuations

Anticipated Solution Approach

Review the current budget process including valuations. Re-design the budget process for efficiency, accuracy, utility, and timeliness. Make information available to interested public parties electronically.

Steps in the Process:

1. Review the budget reporting process
2. De-design budget reporting process conceptually
3. Solicit vendor counsel
4. Consult with local budget officials
5. Develop software programs
6. Pilot projects during the Fall and Winter
7. Implement electronic process for valuations on January 1, 1998
8. Receive budgets electronically by March 15, and April 15, 1998
9. Upload budgets from Internet and computer diskette at Department of Management
10. Certify local property tax rates and levies to local governments electronically by June 15, 1998

Resources Needed:

Federal money, vendor consultation and software design, advice from local governments, and assurances of security.

Broad Timeline for Project

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|-----------------------|---|
| By June 1 , 1997: | Budget and valuation reporting process analyzed, vendor consultation and software design begun, meetings with local officials completed |
| By September 1, 1997: | Develop Web page and begin running pilot projects |
| By November 11, 1997: | Work out bugs and execute plan by November 15, 1997; provide follow-up marketing and training. |

Target Population:

Iowa's 99 counties
Iowa's 377 schools
Iowa's 950 cities
Interested public parties

Goals:

1. To make technically feasible the electronic submission of local budgets and valuation process data
2. Eliminate redundant data entry and duplication of effort between local and state agencies involved in valuations process
3. Display approved data on the Department of Management's home page on the Internet to facilitate better public access and review

4. Simply the valuation process for local and state agencies and enhance the public's ability to access this data

Develop the Means of Evaluating the Project:

1. Elimination of redundant data entry and duplication of effort between local and state agencies involved in valuations process
2. Increase in the number of entities which submit budgets and data electronically
3. Increase the number of citizens who review and use the public information provided on the Department of Management's home page
4. Make taxable valuation data available over the Internet
5. Shorten the processing time for returning valuations, tax rates, and certification of levies to local governments
6. Increase the number of requests for budget information filled via electronic means

Determine How the Project Will Address Privacy and Security Issue in the Project Design:
(ITS will address the security issues for Project 4)

Determine Approaches to the Public Education About the Project:

1. Provide training of local officials by using the Iowa State Association of Counties, Iowa League of Municipalities, Iowa School Board Association, and other professional associations
2. Request that the Iowa State Association of Counties, Iowa League of Municipalities, Iowa School Board Association, and other professional associations assist in the dissemination of materials related to Project 4 to their members and Iowa media
3. Index web site
4. Use existing public notice methods to advertise web site
5. Encourage local governments to post information and web site address on their web site
6. Coordinate effort with other ITS Projects

Determine Project Benefits:

1. Realize cost saving through the elimination of redundant data entry and duplication of effort between local and state agencies involved in valuations process
2. Simply the valuation and budget process for local and state agencies and enhance the public's ability to access this data

Determine Possible Means of Sustainability of the Project:

1. Develop the project so that Sustainability can be achieved with the Department of Management without additional resources

PROJECT WORK PLAN

The participants determined that they would conduct their next meeting on July 9, 1997. It was agreed that representatives to Project 4 from the Department of Management would complete the Project's Work Plan by compiling the "Steps in Process" and "Broad Timeline" sections of the Project Plan with the Model Project Work Plan. It was agreed this draft Work Plan would be submitted to the members of Project 4 by the end of May 1997.